

24 August 2018

Hotel Tourism Short-Term Trends (HOS/HPI/IPHS)
July 2018. Provisional data

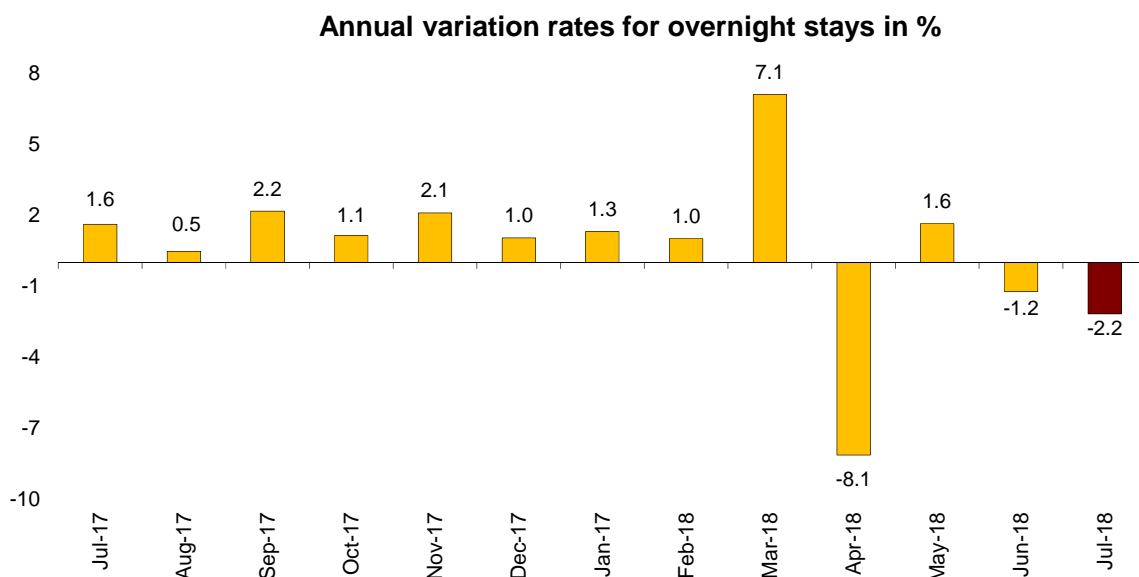
Overnight stays in hotel establishments decrease 2.2% in July as compared with the same month of 2017

Hotels' average rate per occupied room is 101.0 euros, representing an annual increase of 3.1%

During the month of July, overnight stays in hotel establishments exceeded 42.6 million, 2.2% less than in the same month of 2017. Overnight stays of residents in Spain decreased by 1.1% and those of non-residents by 2.7%.

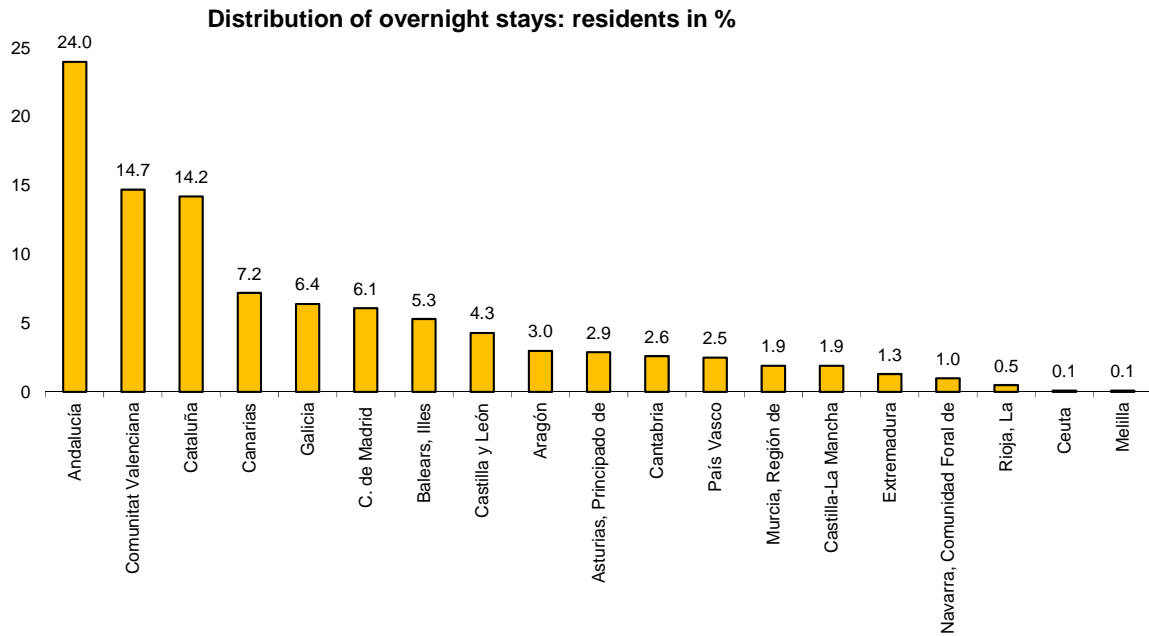
The average stay decreased 0.3% as compared with July 2017, standing at 3.7 overnight stays per traveller.

During the first seven months of 2018, overnight stays decreased by 0.7% as compared with the same period of the previous year.

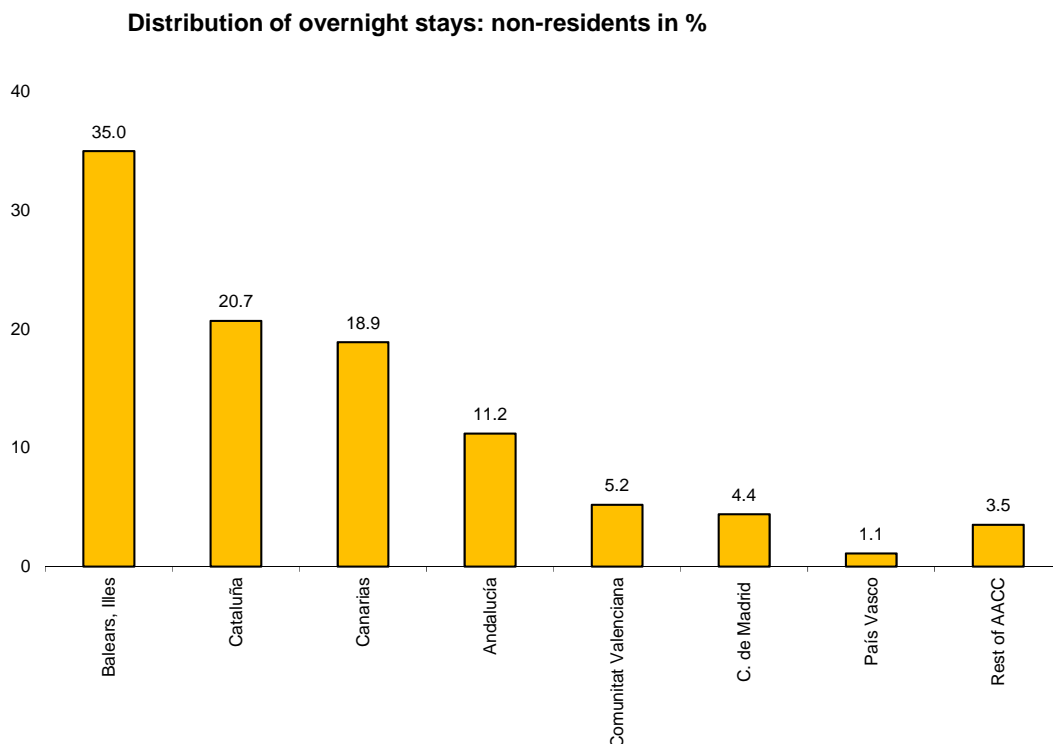


Destinations

Andalucía, Comunitat Valenciana, Cataluña and Canarias were the main destinations of residents in Spain in July, with annual variation rates in the number of overnight stays of 4.9%, -0.6%, -7.2% and 1.0%, respectively.



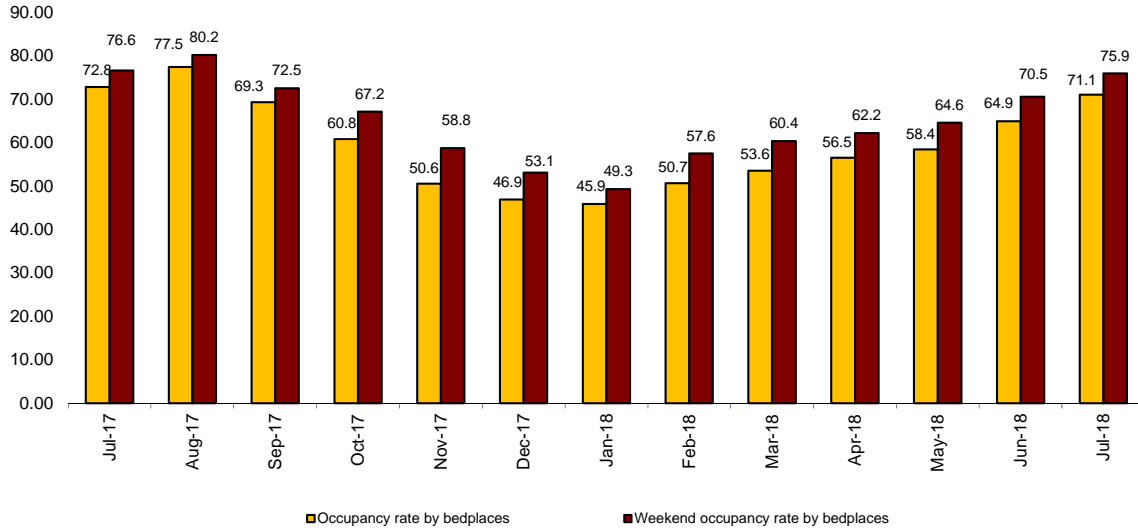
The main destination chosen by non-residents was Illes Balears, with 35.0% of total overnight stays. In this Autonomous Community, overnight stays of foreigners increased by 1.1% as compared to July 2017. The following destinations of non-residents were Cataluña (with 20.7% of the total overnight stays and a decrease of 6.2%) and Canarias (with 18.9% of the total and a decrease of 5.4%).



Hotel occupancy

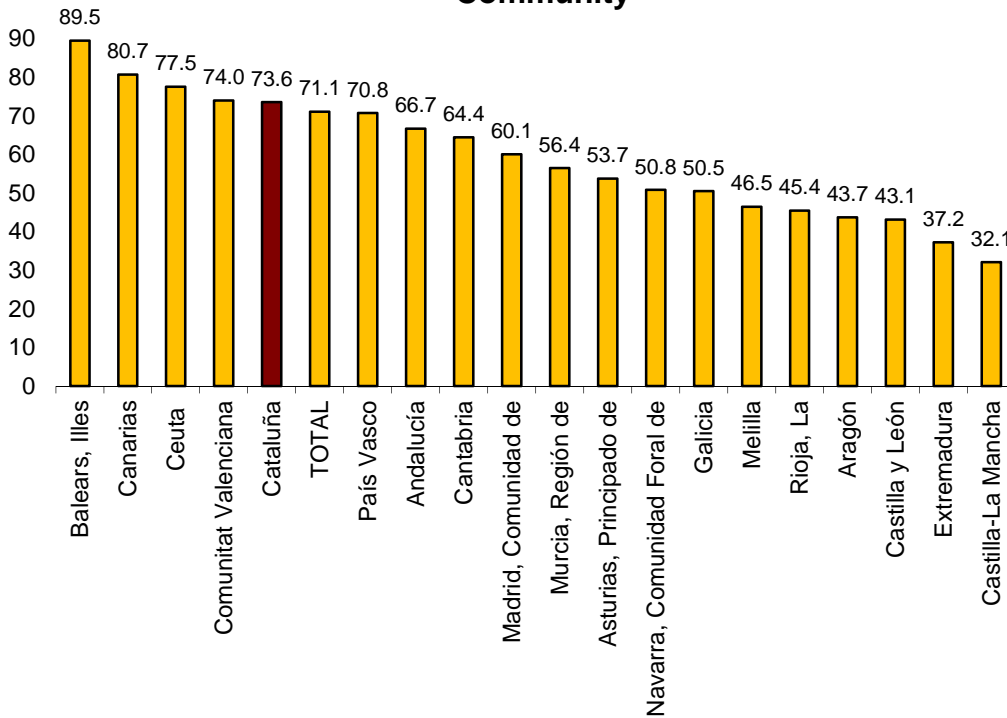
In July, 71.1% of the available bed-places were occupied, indicating an annual decrease of 2.4%. The weekend occupancy rate by bed-places decreased by 0.9%, standing at 75.9%.

Occupancy rate and weekend occupancy rate per bed-places



Illes Balears showed the highest occupancy rate by bed-places in July (89.5%). It was followed by Canarias (80.7%) and Comunitat Valenciana (74.0%).

Occupancy rate per bed-places by Autonomous Community



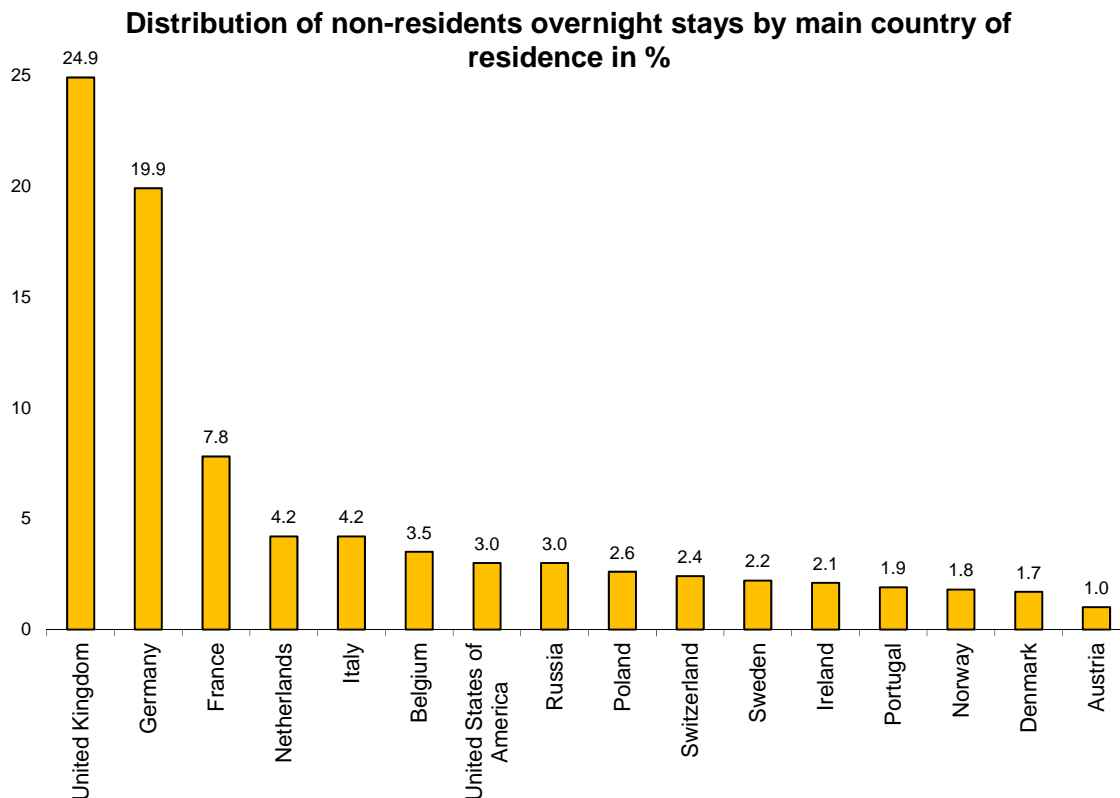
By tourist areas, the island of Mallorca reached the highest occupancy rate by bed-places (90.6%), and Palma-Calvià registered the highest weekend occupancy rate (90.9%). The island of Mallorca registered the highest number of overnight stays, with 8.0 million.

The tourist sites with the highest number of overnight stays were Barcelona, Madrid and Calvià. Santa Margalida recorded the highest occupancy rate by bed-places (95.7%) and Muro the greatest weekend occupancy rate (93.5%).

Overnight stays according to the country of origin of the travellers

Travellers from the United Kingdom and Germany concentrated 24.9% and 19.9%, respectively, of total overnight stays of non-residents in hotel establishments in July. The British market decreased by 2.5% and the German by 11.4%.

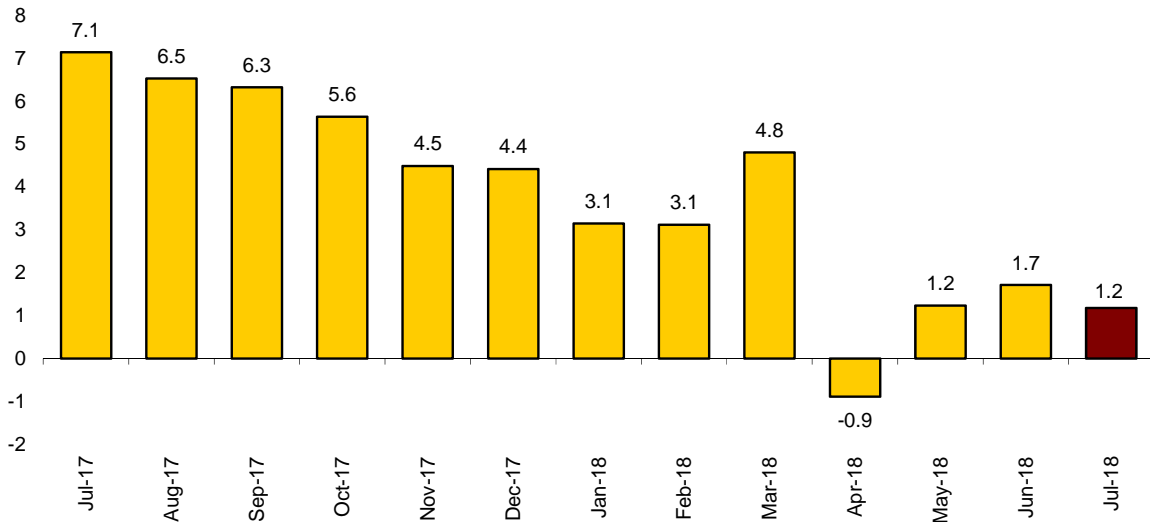
Overnight stays of travellers from France, the Netherlands and Italy (the following countries of origin) registered annual rates of 2.9%, -8.7% and -3.0%, respectively.



Hotel Prices

The annual rate of the Hotel Price Index (HPI) stood at 1.2% in July, which is 0.5 points less than that of the last month and 5.9 points below that registered a year ago.

Hotel Prices Index. Annual variation rate



Illes Balears, Cataluña, Andalucía and Canarias were the most heavily weighted Autonomous Communities in the HPI in July (accounting for 76.6% of the total weight). Hotel prices increased by 3.6% in the annual rate in Illes Balears and 0.2% in Andalucía. In turn, they fell by 0.1% in Canarias and by 2.0% in Cataluña.

By category, hotel prices increased in all of them. In one-silver-star hotels (5.7%), three and two-silver-star hotels (4.1%), three-golden-star hotels (2.6%), five-golden-star hotels (2.1%), two-golden-star hotels (0.5%), one-golden-star hotels (0.5%) and four-golden-star hotels (0.1%).

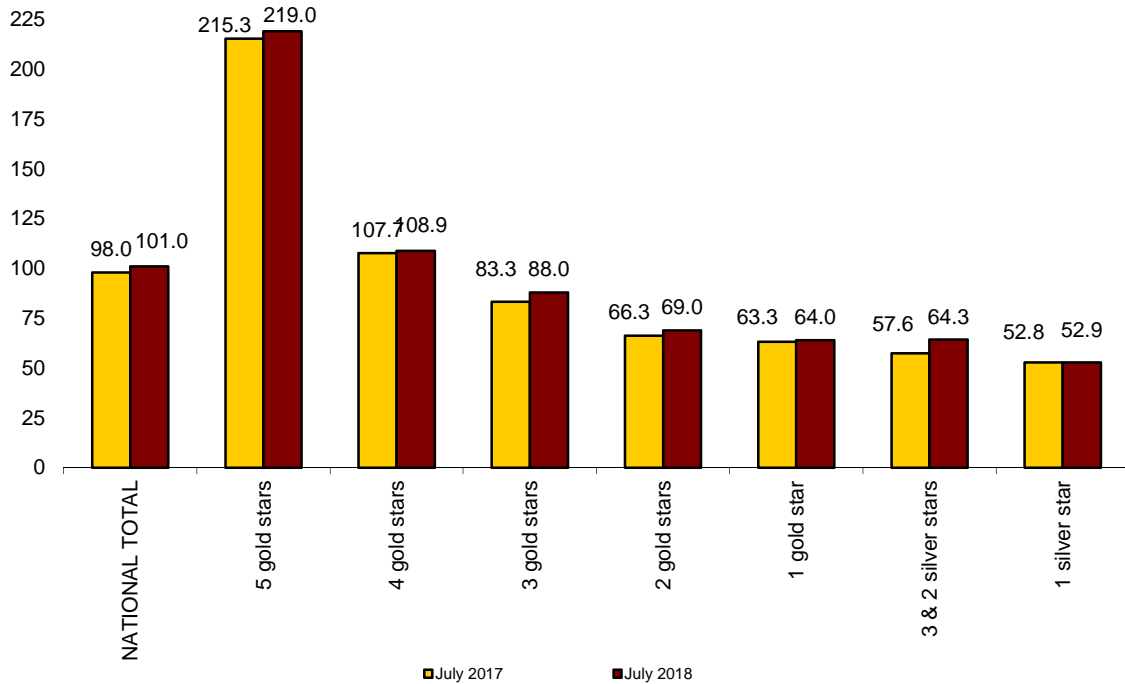
Profitability of the Hotel Sector

The average daily rate per occupied room (ADR) of hotels was 101.0 euros in July, which means an increase of 3.1% as compared with the same month of 2017.

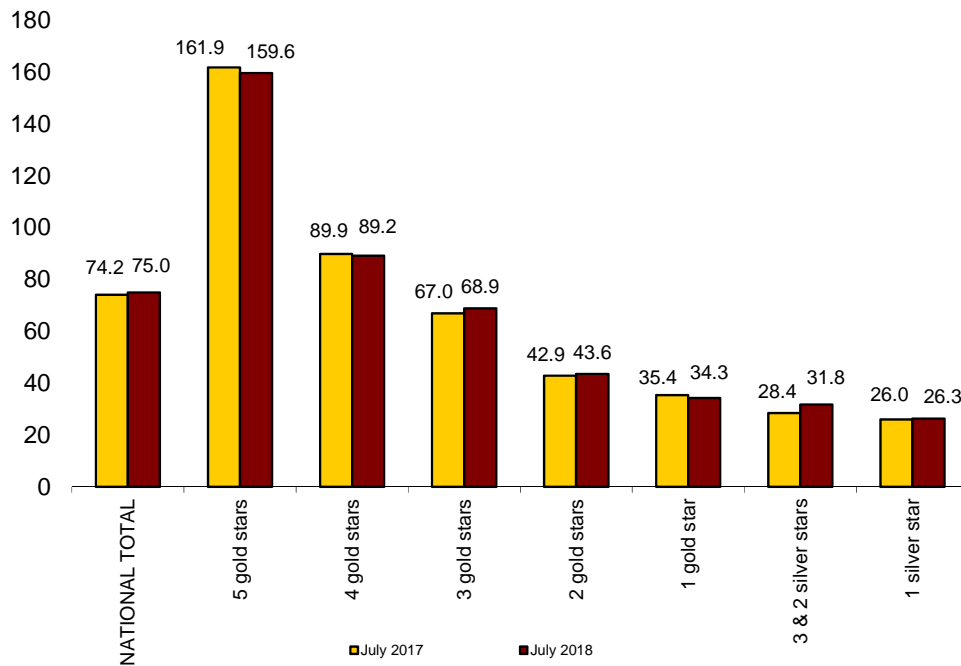
On the other hand, the average daily revenue per available room (RevPAR), which is conditioned by the occupancy registered in hotel establishments, reached 75.0 euros, with a 1.2% increase.

By category, the average rate was 219.0 euros for five-star hotels, 108.9 euros for four-star hotels and 88.0 euros for three-star hotels. Revenues per available room for these same categories were 159.6, 89.2 and 68.9 euros, respectively.

Average daily rate (ADR) by hotel category in euros



Revenue per available room (RevPAR) by hotel category in euros



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Tourist Accommodation Occupancy Survey (Hotels and similar establishments)

July 2018

Provisional Data

1. Guests, overnight stays and average stay by category of establishment

| Category | Number of guests | | | Number of overnight stays | | | Average stay |
|------------------------|-------------------|--------------------|------------------|---------------------------|--------------------|-------------------|--------------|
| | Total | Residents in Spain | Residents abroad | Total | Residents in Spain | Residents abroad | |
| TOTAL | 11,686,283 | 5,373,549 | 6,312,735 | 42,698,817 | 14,181,528 | 28,517,289 | 3.65 |
| HOTELS: Golden stars | | | | | | | |
| Five | 613,382 | 176,112 | 437,269 | 2,338,617 | 450,802 | 1,887,815 | 3.81 |
| Four | 5,266,401 | 2,281,286 | 2,985,115 | 20,973,198 | 6,628,398 | 14,344,800 | 3.98 |
| Three | 3,348,445 | 1,451,021 | 1,897,424 | 13,257,190 | 3,926,082 | 9,331,108 | 3.96 |
| Two | 942,634 | 545,293 | 397,341 | 2,547,470 | 1,203,802 | 1,343,668 | 2.70 |
| One | 372,756 | 225,686 | 147,070 | 914,208 | 490,480 | 423,727 | 2.45 |
| INNS: Silver stars | | | | | | | |
| Two and three | 607,861 | 391,578 | 216,283 | 1,382,654 | 807,541 | 575,113 | 2.27 |
| One | 534,805 | 302,573 | 232,232 | 1,285,481 | 674,422 | 611,059 | 2.40 |
| Annual rate | -1.87 | -1.45 | -2.22 | -2.17 | -1.11 | -2.69 | -0.31 |
| Cumulative annual rate | 0.57 | 0.31 | 0.81 | -0.68 | -0.41 | -0.82 | -1.24 |

2. Open establishments, capacity, occupancy and employed personnel by category of establishment

| Category | Estimated open establishments | Estimated bedrooms | Estimated bed-places | Occupancy rate | | | Employed personnel |
|----------------------|-------------------------------|--------------------|----------------------|----------------|--------------------------|--------------|--------------------|
| | | | | Of bed-places | Of bed-places at weekend | Of bedrooms | |
| TOTAL | 16,966 | 876,147 | 1,833,158 | 71.07 | 75.93 | 73.77 | 275,651 |
| HOTELS: Golden stars | | | | | | | |
| Five | 325 | 48,955 | 103,822 | 70.03 | 74.56 | 71.80 | 36,079 |
| Four | 2,634 | 377,899 | 820,480 | 77.70 | 81.53 | 81.30 | 133,737 |
| Three | 3,007 | 246,355 | 519,613 | 76.55 | 81.25 | 78.40 | 70,413 |
| Two | 2,185 | 70,196 | 137,993 | 58.05 | 66.09 | 62.82 | 14,213 |
| One | 1,396 | 30,244 | 59,033 | 49.47 | 57.74 | 53.08 | 5,351 |
| INNS: Silver stars | | | | | | | |
| Two and three | 3,336 | 52,219 | 99,627 | 44.43 | 52.03 | 48.75 | 8,544 |
| One | 4,084 | 50,279 | 92,589 | 44.48 | 50.02 | 50.12 | 7,314 |
| Annual rate | 0.28 | 1.01 | 1.09 | -2.43 | -0.85 | -1.96 | 1.99 |

3. Guests, overnight stays, occupancy, average stay and employed personnel

Results by area and tourist site

| | Guests | | Overnight stays | | Occupancy rate | | | Average stay | Employed personnel |
|---|--------------------|------------------|--------------------|------------------|----------------|--------------------------|-------------|--------------|--------------------|
| | Residents in Spain | Residents abroad | Residents in Spain | Residents abroad | Of bed-pla | Of bed-places at weekend | Of bedrooms | | |
| Tourist area with a greater occupancy rate per month | | | | | | | | | |
| Isla de Mallorca | 83,257 | 1,188,584 | 347,403 | 7,675,902 | 90.61 | 90.79 | 90.69 | 6.31 | 45,343 |
| Palma - Calvià | 40,769 | 529,965 | 144,992 | 2,859,983 | 89.95 | 90.91 | 89.71 | 5.27 | 18,753 |
| Islas de Ibiza-Formentera | 50,081 | 290,519 | 184,165 | 1,622,000 | 86.42 | 85.75 | 84.23 | 5.30 | 11,298 |
| Isla de Menorca | 41,873 | 95,557 | 220,008 | 686,254 | 86.33 | 85.80 | 88.14 | 6.59 | 4,889 |
| Sur de Gran Canaria | 44,449 | 159,460 | 210,353 | 1,343,091 | 83.15 | 86.63 | 85.37 | 7.62 | 11,227 |
| Sur de Tenerife | 49,431 | 190,105 | 216,573 | 1,531,507 | 82.59 | 84.79 | 81.16 | 7.30 | 15,072 |
| Isla de Lanzarote | 28,218 | 104,226 | 158,610 | 890,336 | 82.32 | 82.29 | 86.52 | 7.92 | 7,133 |
| Costa de Gipuzkoa | 29,658 | 48,149 | 67,398 | 118,795 | 81.97 | 86.30 | 87.25 | 2.39 | 1,359 |

Tourist area with a greater number of overnight stays per month *

| | | | | | | | | | |
|----------------------|---------|---------|---------|-----------|----|----|----|---|--------|
| Costa del Sol | 204,445 | 338,386 | 689,068 | 1,632,143 | 78 | 81 | 84 | 4 | 15,497 |
| Isla de Tenerife | 97,661 | 230,981 | 411,457 | 1,844,902 | 81 | 83 | 79 | 7 | 18,909 |
| Barcelona | 140,250 | 694,693 | 260,298 | 1,876,019 | 80 | 82 | 88 | 3 | 15,304 |
| Costa Blanca | 266,892 | 203,838 | 995,598 | 1,017,544 | 81 | 86 | 83 | 4 | 10,493 |
| Costa Brava | 181,442 | 310,625 | 471,009 | 1,527,089 | 73 | 80 | 74 | 4 | 10,415 |
| Costa Daurada | 195,713 | 213,531 | 588,422 | 1,182,219 | 79 | 82 | 80 | 4 | 7,318 |
| Isla de Gran Canaria | 67,653 | 172,646 | 266,120 | 1,392,585 | 80 | 84 | 83 | 7 | 12,141 |
| Costa Barcelona | 157,404 | 294,959 | 329,782 | 1,256,338 | 77 | 82 | 81 | 4 | 7,657 |

Tourist site with a greater occupancy rate per month

| | | | | | | | | | |
|----------------------------|--------|---------|---------|-----------|-------|-------|-------|------|-------|
| Santa Margalida | 2,494 | 54,094 | 10,300 | 426,590 | 95.69 | 92.21 | 95.10 | 7.72 | 2,118 |
| Manacor | 1,289 | 64,548 | 5,633 | 551,617 | 93.87 | 93.26 | 89.10 | 8.46 | 2,446 |
| Muro | 3,699 | 63,180 | 17,091 | 485,197 | 93.32 | 93.48 | 89.54 | 7.51 | 2,661 |
| Sant Josep de Sa Talaia | 6,749 | 83,593 | 22,644 | 458,947 | 92.07 | 85.03 | 83.64 | 5.33 | 3,342 |
| Sant Llorenç des Cardassar | 3,047 | 85,907 | 16,639 | 730,118 | 92.06 | 90.30 | 93.04 | 8.39 | 3,925 |
| Alcúdia | 3,988 | 83,822 | 22,600 | 643,106 | 91.63 | 88.13 | 93.79 | 7.58 | 3,064 |
| Cambrils | 22,121 | 18,877 | 92,903 | 143,731 | 91.48 | 91.65 | 90.40 | 5.77 | 1,028 |
| Palma de Mallorca | 38,455 | 296,393 | 112,603 | 1,261,013 | 91.46 | 92.95 | 91.54 | 4.10 | 8,390 |
| Ciudadella de Menorca | 15,637 | 41,991 | 90,969 | 324,538 | 90.90 | 86.15 | 89.05 | 7.21 | 1,936 |
| Salines (Ses) | 1,450 | 12,432 | 7,066 | 102,631 | 89.83 | 89.28 | 89.24 | 7.90 | 701 |

Tourist site with a greater number of overnight stays per month *

| | | | | | | | | | |
|---------------------------|---------|---------|---------|-----------|-------|-------|-------|------|--------|
| Barcelona | 125,374 | 660,417 | 233,749 | 1,803,901 | 80.64 | 82.74 | 88.51 | 2.59 | 14,662 |
| Madrid | 347,293 | 508,003 | 560,397 | 1,149,517 | 62.95 | 66.88 | 73.84 | 2.00 | 11,801 |
| Calvià | 8,860 | 238,575 | 42,062 | 1,524,158 | 89.52 | 90.10 | 88.93 | 6.33 | 9,717 |
| Benidorm | 127,049 | 108,078 | 589,855 | 687,664 | 83.35 | 87.04 | 85.14 | 5.43 | 6,072 |
| San Bartolomé de Tirajana | 35,734 | 114,158 | 168,782 | 965,426 | 84.12 | 87.91 | 85.54 | 7.57 | 8,689 |
| Salou | 74,591 | 122,426 | 247,790 | 823,578 | 86.31 | 87.28 | 86.93 | 5.44 | 3,737 |
| Adeje | 24,529 | 99,033 | 108,371 | 801,386 | 82.16 | 83.69 | 79.94 | 7.36 | 8,740 |
| Lloret de Mar | 29,141 | 119,402 | 92,693 | 746,913 | 79.33 | 82.20 | 81.08 | 5.65 | 3,205 |
| Pájara | 11,659 | 81,033 | 62,330 | 740,714 | 84.71 | 85.68 | 81.63 | 8.66 | 5,234 |
| Torremolinos | 47,185 | 71,638 | 192,839 | 430,699 | 89.20 | 89.07 | 88.09 | 5.25 | 3,194 |

*Sin considerar los incluidos en la tabla anterior, por aparecer también con mayor grado de ocupación.

4. Guests and overnight stays by country of residence

Results by country

| Countries | Number of guests | | Overnight stays | |
|---------------------------------------|-------------------|---------------|-------------------|---------------|
| | Total | % | Total | % |
| TOTAL | 11,686,283 | 100.00 | 42,698,817 | 100.00 |
| Residentes en España | 5,373,549 | 45.98 | 14,181,528 | 33.21 |
| Residentes en el extranjero | 6,312,735 | 54.02 | 28,517,289 | 66.79 |
| TOTAL residentes en el extranjero | 6,312,735 | 100.00 | 28,517,289 | 100.00 |
| TOTAL residentes en U.E. (sin España) | 4,447,816 | 70.46 | 22,695,251 | 79.58 |
| - Alemania | 878,976 | 13.92 | 5,678,978 | 19.91 |
| - Austria | 61,252 | 0.97 | 291,186 | 1.02 |
| - Bélgica | 203,723 | 3.23 | 998,061 | 3.50 |
| - Dinamarca | 98,771 | 1.56 | 480,667 | 1.69 |
| - Finlandia | 34,715 | 0.55 | 142,351 | 0.50 |
| - Francia | 664,187 | 10.52 | 2,232,897 | 7.83 |
| - Grecia | 11,974 | 0.19 | 34,001 | 0.12 |
| - Irlanda | 106,781 | 1.69 | 586,712 | 2.06 |
| - Italia | 319,089 | 5.05 | 1,184,863 | 4.15 |
| - Luxemburgo | 8,033 | 0.13 | 37,852 | 0.13 |
| - Países Bajos | 260,451 | 4.13 | 1,209,412 | 4.24 |
| - Polonia | 122,558 | 1.94 | 738,317 | 2.59 |
| - Portugal | 176,560 | 2.80 | 554,150 | 1.94 |
| - Reino Unido | 1,196,355 | 18.95 | 7,110,438 | 24.93 |
| - República Checa | 43,669 | 0.69 | 256,133 | 0.90 |
| - Suecia | 129,601 | 2.05 | 621,368 | 2.18 |
| - Resto de la UE* | 131,123 | 2.08 | 537,865 | 1.89 |
| Noruega | 93,514 | 1.48 | 500,513 | 1.76 |
| Rusia | 138,029 | 2.19 | 863,803 | 3.03 |
| Suiza | 140,349 | 2.22 | 679,034 | 2.38 |
| Resto de Europa | 129,590 | 2.05 | 551,279 | 1.93 |
| Japón | 41,586 | 0.66 | 81,881 | 0.29 |
| Estados Unidos | 363,260 | 5.75 | 866,445 | 3.04 |
| Resto de América | 395,549 | 6.27 | 954,557 | 3.35 |
| Países africanos | 96,110 | 1.52 | 252,382 | 0.89 |
| Resto del mundo | 466,931 | 7.40 | 1,072,145 | 3.76 |

*Countries included in Other EU countries: Bulgaria, Cyprus, Croatia, Slovakia, Slovenia, Estonia, Hungary, Latvia, Lithuania, Malta and Romania

Indicators on the Profitability of the Hotel Sector

July 2018

Provisional data

National ADR and RevPAR^(*) and breakdown by Autonomous Cities and Communities

| | ADR (in euros) | Annual growth rate | RevPar (in euros) | Annual growth rate |
|-----------------------------|-------------------|-----------------------|----------------------|-----------------------|
| TOTAL | 101.04 | 3.05 | 75.01 | 1.15 |
| Andalucía | 107.20 | 2.21 | 76.52 | 1.13 |
| Aragón | 54.81 | 1.53 | 26.86 | 5.92 |
| Asturias, Principado de | 68.56 | 1.70 | 39.01 | -4.62 |
| Balears, Illes | 123.40 | 6.33 | 110.27 | 5.29 |
| Canarias | 94.50 | 0.89 | 77.62 | -3.07 |
| Cantabria | 85.46 | 1.54 | 57.41 | -0.48 |
| Castilla y León | 57.56 | 0.97 | 27.21 | 0.23 |
| Castilla - La Mancha | 52.45 | -0.35 | 19.40 | 5.02 |
| Cataluña | 106.46 | 1.46 | 83.11 | -2.88 |
| Comunitat Valenciana | 96.22 | 5.17 | 75.06 | 3.68 |
| Extremadura | 57.16 | -0.05 | 23.64 | 9.34 |
| Galicia | 63.18 | 2.48 | 33.52 | -3.30 |
| Madrid, Comunidad de | 81.93 | 1.02 | 57.99 | 1.50 |
| Murcia, Región de | 77.20 | -1.23 | 48.92 | 4.60 |
| Navarra, Comunidad Foral de | 86.98 | -5.82 | 51.00 | -6.70 |
| País Vasco | 102.38 | 2.43 | 81.62 | 4.15 |
| Rioja, La | 61.24 | 3.79 | 32.94 | 5.02 |
| Ceuta | 69.82 | -0.68 | 54.38 | 6.92 |
| Melilla | 69.44 | 5.57 | 45.46 | 5.87 |

National ADR and RevPAR^(*) and breakdown by categories

| | ADR (in euros) | Annual growth rate | RevPar (in euros) | Annual growth rate |
|----------------------------------|-------------------|-----------------------|----------------------|-----------------------|
| TOTAL | 101.04 | 3.05 | 75.01 | 1.15 |
| HOTELS: Gold stars | | | | |
| Five | 219.03 | 1.72 | 159.61 | -1.39 |
| Four | 108.85 | 1.07 | 89.22 | -0.69 |
| Three | 87.96 | 5.56 | 68.93 | 2.92 |
| Two | 69.03 | 4.08 | 43.64 | 1.68 |
| One | 64.04 | 1.21 | 34.31 | -3.19 |
| GUESTHOUSES: Silver stars | | | | |
| Three and two | 64.27 | 11.65 | 31.75 | 11.62 |
| One | 52.92 | 0.23 | 26.31 | 1.27 |

(*) ADR: Average Daily Rate
RevPAR: Revenue per Available Room

Hotel Price Index (HPI). 2008 Base

July 2018

Provisional data

National General Index and breakdown by Autonomous Cities and Communities

| | Index | Annual growth rate |
|-----------------------------|---------------|--------------------|
| TOTAL | 119.49 | 1.18 |
| Andalucía | 109.72 | 0.23 |
| Aragón | 62.06 | 0.93 |
| Asturias, Principado de | 97.99 | -0.40 |
| Balears, Illes | 148.33 | 3.60 |
| Canarias | 126.19 | -0.14 |
| Cantabria | 100.95 | -2.55 |
| Castilla y León | 96.08 | 1.43 |
| Castilla - La Mancha | 88.82 | 1.81 |
| Cataluña | 116.07 | -1.95 |
| Comunitat Valenciana | 118.08 | 3.80 |
| Extremadura | 96.04 | 2.22 |
| Galicia | 100.25 | 0.33 |
| Madrid, Comunidad de | 89.14 | 2.44 |
| Murcia, Región de | 90.47 | 4.20 |
| Navarra, Comunidad Foral de | 87.87 | -4.44 |
| País Vasco | 121.02 | 5.46 |
| Rioja, La | 86.82 | 1.84 |
| Ceuta | 114.06 | 4.65 |
| Melilla | 99.86 | 4.74 |

National General Index and breakdown by categories

| | Index | Annual growth rate |
|------------------------------|---------------|--------------------|
| TOTAL | 119.49 | 1.18 |
| HOTELS: Gold stars | | |
| Five | 110.17 | 2.06 |
| Fourth | 114.48 | 0.06 |
| Three | 130.22 | 2.60 |
| Two | 117.22 | 0.53 |
| One | 125.33 | 0.47 |
| HOSTALS: Silver stars | | |
| Three and two | 123.83 | 4.06 |
| One | 121.27 | 5.68 |